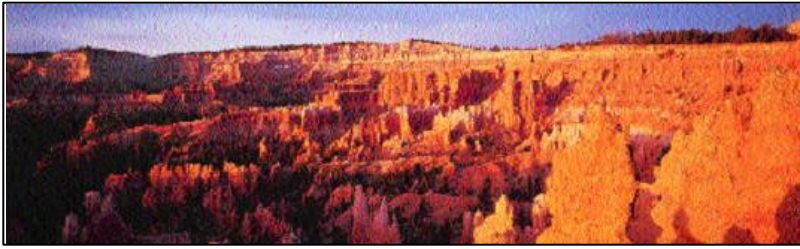


INTERNATIONAL VISITORS TO NATIONAL PARKS



Over 40% of all visitors to Utah were identified as National Park visitors as a result of identifying a national park as a primary destination during a trip to the U.S. Overall, 78% of all Utah's overseas visitors indicated that visiting a national park (whether a primary destination or not) was one of several

activities participated in during a U.S. trip. National Park visitors to Utah have specific traveler characteristics that make this traveling segment unique and different from other travel segments.

Demographics. The average national park visitor to Utah is less affluent than other visitors to the state. As a result, average daily spending is also less than the statewide average for all overseas visitors. *Leisure groups (spouse, family members, friends and group tours) are much more common among national park visitors than among all visitors to the state.* European markets, led by Germany, France and the U.K, dominate the national park traveler segment. Italy, the Benelux countries and Switzerland are also important markets within this travel segment. The only non-European country that represents a significant market for national park travelers is Japan.

Travel Patterns. The national park visitor is typically a less experienced U.S. traveler. Consequently, advance trip decisions are often made well in advance (133 days) and packages are more common than among all overseas travelers to the state. National park travelers typically spend less time in Utah as well as in the U.S. compared to other groups, although they are often more mobile than other travelers, demonstrating a tendency to visit more states and more destinations than all travelers to the state. Car rentals are the preferred choice of transportation within the U.S. While the majority stay in either a hotel or motel, a significant number also camp. Among favored destinations, the national park traveler is more likely to make trips to California (San Francisco, Los Angeles, Yosemite, San Diego and Death Valley), Arizona (Grand Canyon and Phoenix) and Nevada (Las Vegas). Among Utah destinations, Bryce Canyon National Park was the preferred destination, followed by Zion National Park, Monument Valley Navajo Tribal Park and Glen Canyon National Recreation Area. *Salt Lake City was only mentioned as a destination by 4% of national park visitors.*

Purposes and Activities. Travel to national parks is almost exclusively a leisure travel activity. Over 90% of national park travelers to Utah indicated their primary purpose was a leisure trip. As expected, national park travelers tend to participate in a wide variety of outdoor activities. Compared to all travelers to the state, national park travelers are more likely to visit national parks, gamble, visit cultural or heritage sites, camp or hike and participate in an eco or environmental excursion. Conversely, national park visitors are less likely to attend a concert, play or musical, visit a nightclub or sporting event, and play golf, tennis or ski.

OVERSEAS VISITORS TO UTAH SUMMARY - 1997-1999*

Overseas Travelers who visit National Parks (40% of all Overseas Travelers to Utah)

DEMOGRAPHICS	
AGE (years)	
Average Age (mean)	42.1
18-34 Years	36%
35-54 Years	46%
55+ Years	19%

HOUSEHOLD INCOME (\$US)	
Average HH Income	\$66,500
< \$40,000	30%
\$40,000 - \$80,000	41%
\$80,000 - \$120,000	18%
\$120,000+	11%

PARTY COMPOSITION	
Avg. Travel Party (mean)	2.2
Spouse	44%
Family/Relatives	36%
Friends	19%
Traveling Alone	12%
Group Tour	7%
Business Associates	2%
Adults Only	88%
Adults and Children	12%

GENDER	
Men	66%
Women	35%

FREQUENT TRAVELERS	
Repeat Visitor to the U.S.	61%
U.S. Trips last 12 Months	1.3
U.S. Trips last 5 Years	2.7
1 Trip	48%
2 - 5 Trips	41%
5+ Trips	11%

ORIGIN MARKETS (1999 only)	
Germany	26%
France	21%
U.K.	12%
Italy	8%
Benelux	8%
Japan	8%
Switzerland	6%
Oceania	2%

PORT OF ENTRY	
Los Angeles	29%
San Francisco	17%
Chicago	8%
Detroit	7%
New York	6%

VISITATION VOLUME (1999 only)	
Total Int'l. Visitation (000s)	283

TRAVEL PATTERNS	
ADVANCE TRIP DECISION	
Advance Trip Decision	133 Days
Advance Air Reservations	91 Days
Use of Pre-Booked Lodging	68%

USE OF PACKAGES	
YES	40%
Air/Lodging	28%
Guided Tour	20%
Air/Rental Car	18%
Air/Lodging/Tour	14%
Air/Lodging/Rental Car	13%
Air/Lodging/Bus	10%
Air/Lodging/Bus/Tour	9%
Advance Package Booking	90 Days
# of Nights Pre-paid as Part of a Package	13.3

INFORMATION SOURCES	
Travel Agency	65%
Travel Guides	31%
Friends/Relatives	26%
State/City Travel Office	20%
Personal Computer	13%
Newspapers/Magazines	12%
Tour Company	11%
Airlines Directly	7%
Other	8%

EXPENDITURES	
Avg. Spending Per-Visitor-	
Per-Day (mean)	\$73

ACCOMMODATIONS	
Hotel/Motel	80%
Private Home	1%
Other	21%

TRANSPORTATION IN U.S.	
Rented Auto	65%
Airlines in U.S.	30%
Taxi/Cab/Limousine	22%
City Subway/Tram/Bus	19%
Company or Private Auto	15%

LENGTH OF STAY	
# of Nights In Utah (mean)	3.7
# of Nights in US (mean)	20.6

UTAH DESTINATIONS VISITED	
Bryce Canyon N.P.	63%
Zion N.P.	32%
Monument Valley	30%
Glen Canyon	12%
Salt Lake City	4%

PURPOSE/ACTIVITIES	
PURPOSE OF TRIP	
Leisure & VFR	93%
Leisure/Rec./Holidays	88%
Visit Friends/Relatives	5%
Business & Convention	7%
Business/Professional	3%
Convention/Conference	4%
Study/Teaching	1%

OTHER DESTINATIONS VISITED	
# of States Visited	3.9
# of Destinations Visited	6.3
California	83%
San Francisco	56%
Los Angeles	51%
Yosemite N.P.	28%
San Diego	14%
Death Valley N.P.	10%
Arizona	81%
Grand Canyon N.P.	65%
Phoenix	14%
Nevada	74%
Las Vegas	74%
Wyoming	10%
Yellowstone N.P.	9%
Colorado	9%
New York	7%
New York City	7%

LEISURE ACTIVITIES	
Visit National Parks	92%
Shopping	85%
Dining in Restaurants	79%
Sightseeing in Cities	59%
Visit Historic Places	58%
Touring Countryside	58%
Visit Small Towns	54%
Casinos/Gambling	53%
Amusement/Theme Parks	49%
Cultural or Heritage Sites	45%
Visit Am. Indian Comm.	38%
Guided Tours	30%
Camping/Hiking	27%
Art Gallery/Museum	24%
Water Sports/Sunbathing	22%
Environ./Eco Excursions	15%
Ethnic Heritage Sites	13%
Concert/Play/Musical	8%
Nightclubs/Dancing	6%
Attend Sports Event	4%
Cruises	4%
Ranch Vacations	3%
Golfing/Tennis	2%
Hunting/Fishing	1%
Snow Skiing	1%

*SOURCE: U.S. Department of Commerce, ITA/Tourism Industries